

NORTH DAKOTA PUBLIC EMPLOYEES RETIREMENT SYSTEM

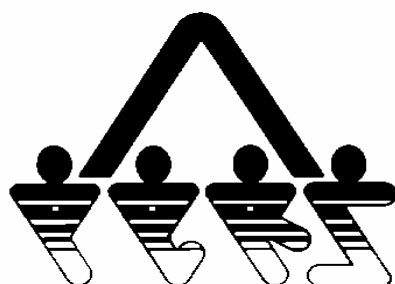


PRE-RETIREMENT EDUCATION PROGRAM (PREP) FACILITATOR'S GUIDE

(Revised May 2006)

Table of Contents

WHAT IS A PRE-RETIREMENT EDUCATION PROGRAM (PREP)	Pg. 1
PROGRAM REQUIREMENTS	Pg. 2
MEETING REQUEST FORM	Pg. 2
PROPOSED AGENDA	Pg. 3
EMPLOYER RESPONSIBILITIES	Pg. 4
THE IDEAL SETTING	Pg. 5 – 6
SAMPLE ROOM ARRANGEMENT	Pg. 7
TIMETABLE (COORDINATORS CHECKLIST)	Pg. 8
SAMPLE INVITATION	Pg. 9
REGISTRATION FORM	Pg. 10
SAMPLE FACILITY VERIFICATION FORM	Pg. 11



What Is A Pre-Retirement Education Program (PREP) ?

The Pre-Retirement Education Program is intended to be pre-retirement education geared toward assisting long-term employees and spouses in planning for a successful life after leaving state employment. It is impossible to plan the future for employees. However, the goal of pre-retirement education is to provide the tools necessary to plan for oneself.

With this in mind, the employee should be encouraged to begin this planning process. The results of pre-retirement education are clear:

- ✓ The employee can have a more successful retirement by making more informed and better decisions.
- ✓ The employer can save work hours and other costs incurred by excessive explanations and counseling on financial issues.
- ✓ The employer may also experience increased productivity and improved relations with employees by demonstrating concern and a desire to help with personal goals for valued employees.

This program will not only address crucial issues to be considered in planning, but should provide an informational base to work from.

PROGRAM REQUIREMENTS

The program is available to groups with a minimum of 20 NDPERS members, (maximum 50 NDPERS members), not including spouses.

Target group is employees age 30 and up, but not limited to that age group.

If an employer has less than 20 interested participants, the employer may coordinate with another participating employer. Coordinating employer groups will be the responsibility of the employers.

Each employee attending the Pre-Retirement Education Program will receive a three ring binder containing course material. **The employer is responsible for the cost of these binders. (Currently the cost is \$20.00 per binder, no refunds for cancellations)** There is no charge for spouses. The employer will be charged for binders for all who registered, even if they do not show up, for the seminar regardless of the reason. Individuals may cancel by contacting the employer contact person. The contact person must contact NDPERS 3 weeks prior to seminar date in order to be a qualified cancellation for an individual and/or seminar. Any cancellations after that date the employer will be responsible for the cost of the binders.

Each Pre-Retirement Education Program must be scheduled with NDPERS staff at least 90 days in advance. Please submit [Meeting Request and Registration SFN 53176](#) to the NDPERS office. Seminar dates are reserved on first come, first serve basis and will be conducted on first come first serve basis, one per month. NDPERS will make every attempt to accommodate your request. You will be contacted regarding your request and sent a Facility Verification Form.

In compliance with the "Americans with Disabilities Act" (ADA), it will be your responsibility to ensure an accessible facility for participants with disabilities and to make arrangements for any auxiliary services which may be required.

Pre-Retirement Education Programs are approximately eight hours in duration. Generally, **registration begins at 7:15 a.m. and the program starts promptly at 8:00 a.m.**

PROPOSED AGENDA

Registration Period	45 Minutes
Introduction	15 Minutes
Social Security	1 Hour 15 Minutes
Break	15 Minutes
Financial Planning	1 Hour 15 Minutes
NDPERS Deferred Compensation	45 Minutes
Lunch	1 Hour
NDPERS Retirement Benefits	1 Hour 15 Minutes
Legal Aspects of Retirement	1 Hour 15 Minutes
Afternoon Break	15 Minutes
NDPERS Insurance	1 Hour 15 Minutes
1. Health	
2. Retiree Health Credit	
3. Life	
4. Dental	
5. Vision	
6. Long Term Care	
Closing/Evaluation of Program	15 Minutes

***Seminar is only available during regular working hours
Tuesday – Thursday**

EMPLOYERS RESPONSIBILITIES

As a sponsor of a Pre-Retirement Education Program, the following responsibilities are yours:

- ✓ You must define who will attend (includes coordinating with other agencies)
- ✓ If you are including outside participants, you will need to make arrangements to bill that employer separately to recover the charges to you for their employees who attend.
- ✓ Make arrangements for the meeting room, ensuring compliance with the "Americans with Disabilities Act" (ADA).
- ✓ Complete [Facility Verification Form](#) and return to NDPERS no later than 45 working days before the event.
- ✓ Send out seminar invitations and registration forms.
- ✓ Return all completed registrations forms to NDPERS. (Send entire group together)
- ✓ Inform NDPERS expected number of attendees' 3 weeks before seminar.
- ✓ Send NDPERS information regarding attendees and their spouses.
- ✓ Arrange for a member of your staff to assist with registration the morning of the seminar.
- ✓ Make payment for the cost of materials upon receipt of invoice.

THE IDEAL SETTING

Creating a good setting for the seminar will enhance the effectiveness of the presentations, as well as foster a learning atmosphere. Some of the points outlined below should prove useful in your preparations as facilitator.

- When scheduling a room, you will need to consider both what it can add to a workshop and what its drawbacks are. Experience has taught us that even with the best of intentions, whenever a workshop is scheduled on-site, inevitable interruptions will occur: People will be called out of the seminar for various reasons; some participants will be late after breaks or lunch because they stopped at their desks and then got delayed by work; some may be detained to the point they cannot even return to the workshop.

Therefore, the optimum location will be one away from the agency where the participants will feel free to devote their entire attention toward the presenters and the information given during the workshop. Another agency in your area may have an adequate meeting room. However, if you must have it on-site, please make it clear to all supervisors that interruptions are not to be tolerated, except in the case of an extreme personal emergency.

- You will need to reserve a room that will comfortably accommodate the participants, their spouses, the resource authorities, and the facilitators. The "Americans with Disabilities Act" (ADA) prohibits the administration of programs, activities, and services which deny or limit participation by individuals with disabilities. Therefore, it is your responsibility to ensure that the facility is accessible to all participants and that any special accommodations are provided if requested.

Consider the size and the shape of the room. Does sound travel well? Will the listeners toward the rear be able to hear the speaker in the front? Are there distracting noises associated with the room, such as a noisy ventilation/heating system or a squeaky door? Is the lighting adequate, and can it be controlled and dimmed when using visual aids?

- The arrangement of the room is equally important. The seating arrangement should be informal, and tables are a must since they provide a writing surface for taking notes as well as space for the participants to spread out their seminar materials. The sample room arrangement is based on using 8-foot tables with seating of no more than 5 people per table. The chairs should be comfortable since the participants will be spending an entire day occupying them.

Auditoriums should be discounted, because they do not foster a participatory workshop atmosphere, but one of lecturer/listener and the desk space is not ample enough.

- What equipment is necessary will depend upon the room, the speakers, and the schedule. For most seminars podium and screen will be required for visuals as most speakers will be using power point programs. Some of the speakers prefer a flip chart and markers, so have one of these available as well. We suggest having two types of microphones available. Some speakers like podium microphones that can be handheld, while others prefer the portable or lavalier microphones.

All of this equipment should be reserved far in advance, and should be set up and ready to use in the chosen room by 7:15 a.m. on the morning of the seminar. Equipment should also be tested to make sure it is in good working condition so that there will be no unnecessary delays while someone searches for a replacement bulb or cord. Such equipment should be placed where all seminar participants in the arranged seating area can see visuals.

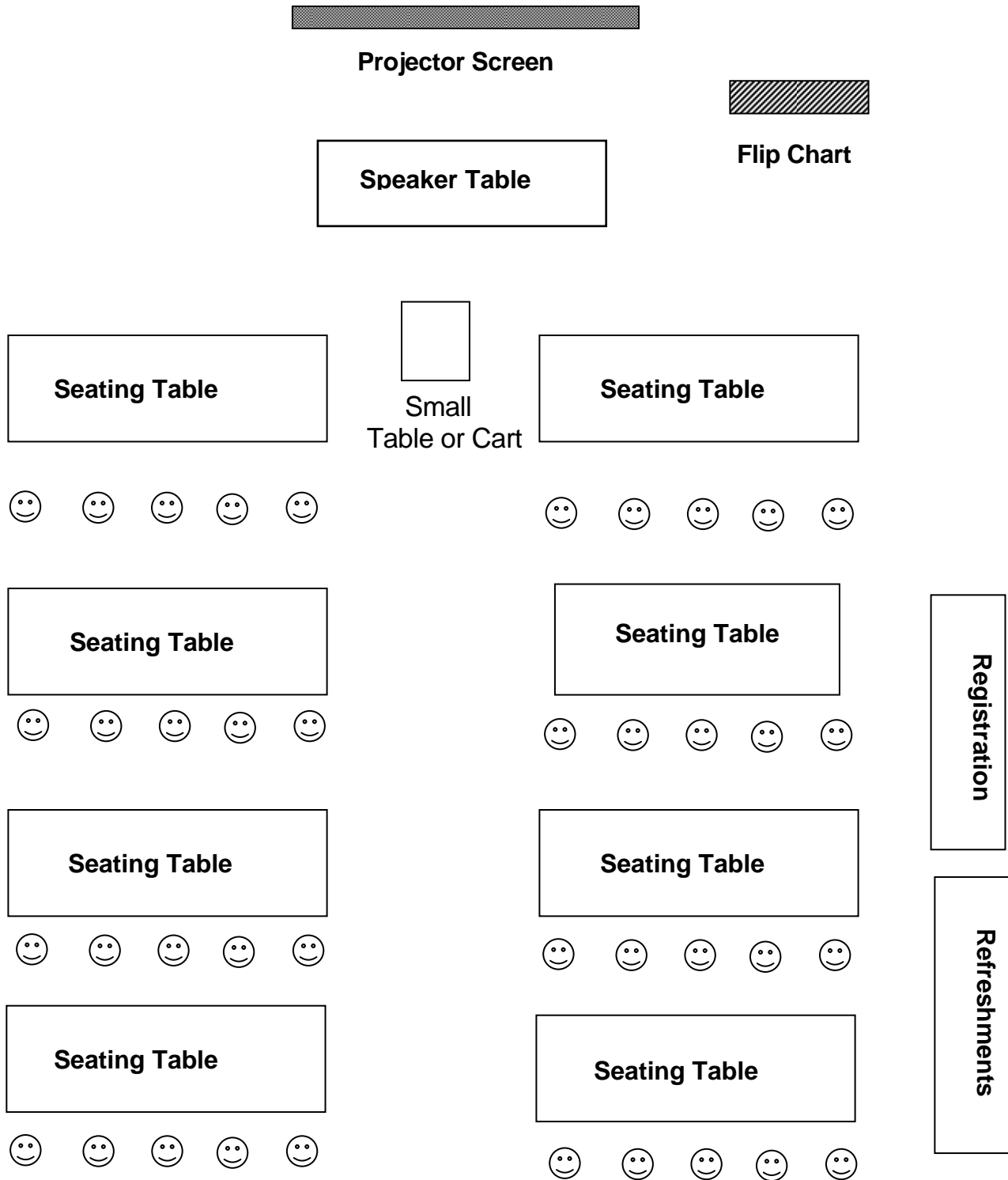
Additional supplies needed for the seminars are: a table at the front of the room for the laptop and for materials brought by the resource authorities; a pitcher of water and cups on the front table for the speakers. Additionally, you must make arrangements for those participants who request special accommodations, i.e., signers, large print, etc.

- Another suggestion would be to have some sort of morning refreshments for the participants, such as juice, coffee, muffins, fruit, etc. Experience dictates that this small touch will keep employees alert during the morning, and it helps keep them close by during the break, which means your seminar is more likely to keep on schedule. In the afternoon it is suggested that you provide some sodas, water and/or juices and perhaps an afternoon snack for the same reasons outlined above.

The North Dakota Public Employees Retirement System is here to help you and your employees' plan for retirement, and one of the key ways is through the Pre-Retirement Education Program. If you should run into any problems in connection with the planning of one of these workshops, call and we will work with you to arrive at a mutually satisfactory solution.

SAMPLE ROOM ARRANGEMENT

(Based on 8 foot tables)



TIMETABLE

Coordinators Checklist

Date of seminar must be confirmed 90 days prior to the date of the seminar.

☐ **8 weeks prior to seminar:**

- Send out invitations to seminar with a registration forms (examples are on pages 9 and 10).

☐ **6 weeks prior to seminar:**

- Mail directions and map of the chosen location (if necessary) to NDPERS.
- Provide NDPERS with number of anticipated attendees so materials can be ordered.

☐ **4 weeks prior to seminar:**

- Return registration forms to NDPERS.
- Provide NDPERS with final number of attendees.

☐ **2 weeks prior to seminar:**

- Send out reminder to attendees containing date, time, and location of seminar.

☐ **Day of seminar:**

- Ensure a representative of the sponsoring employer is on-site to register participants at the time scheduled.
- Ensure all necessary equipment is both operational and available and conference room is set up appropriately.
- Ensure equipment and conference room is handled at the close of the day.

☐ **After seminar:**

- Pay invoice for the cost of the materials

SAMPLE INVITATION

You are invited to attend a Pre-Retirement Education Program that is being presented by the North Dakota Public Employees Retirement System. The seminar will be held at _____ located in _____ on _____.

Topics of discussion will be as follows:

1. Social Security
2. Financial Planning
3. NDPERS Retirement Benefits, Deferred Comp &
4. Legal Concerns
5. NDPERS Health Insurance, Retiree Health Credit, Dental, Vision, and Long Term Care Insurance Plans

The workshops are designed to provide you with ideas and information that will assist you in planning for a successful retirement.

NDPERS members will receive a binder of pertinent materials upon registering the day of the seminar. Please encourage your spouse to attend if at all possible. You must pre-register with your employer to attend.

If you require any auxiliary services or special accommodations, please inform us 10 business days prior to the meeting date.

Sincerely,

REGISTRATION FORM

REGISTRATION FORM

Please Print

(In compliance with the Federal Privacy Act of 1974, the disclosure of the individual's social security number on this form is mandatory pursuant to 26 U.S.C. § 3402. The individual's social security number will be used as an identification number.)

NAME: _____

SSN: _____

ADDRESS: _____

CITY: _____ ZIP CODE: _____

PHONE: (work) _____ E-mail Address: _____

☐ YES, my spouse will be attending. Spouse's Name: _____

☐ NO, my spouse will not be attending.

☐ Paying by check (enclosed) ☐ IDB Billing Dept # _____ Contact Person: _____

NDPERS BENEFIT ESTIMATE INFORMATION

Retirement Projection (LIMITED to 2 projections; this includes unused sick leave):

☐ Age 55 ☐ Age 62 ☐ Age 65 ☐ Earliest Rule of 85 ☐ Other-Specify Date: _____

Unused Sick Leave Purchase:

(Leave blank if unused sick leave purchase is not desired)

_____ Number of hours of accumulated sick leave

***** RETURN NO LATER THAN _____ ******

TO: _____

NDPERS PRE-RETIREMENT EDUCATION PROGRAM

SAMPLE FACILITY VERIFICATION FORM

PART A	SPONSOR INFORMATION
Sponsor:	
Coordinator:	
Date of Program:	
Telephone Number:	
E-mail:	

PART B	GENERAL FACILITY INFORMATION
Name of Facility:	
Address of Facility:	
Name of on-site Contact Person:	
Phone Number of On-Site Contact Person:	
Phone Number at Facility for Emergencies:	
Equipped with Adequate Restroom Facilities? <input type="checkbox"/> Yes	
Earliest Date Materials Can Be Delivered:	

PART C	MAIN MEETING ROOM
Name of Room:	
Capacity:	
Large enough to provide for adequate seating (Table and chair space for each participant)? <input type="checkbox"/> Yes	
Date(s) Reserved:	
Food / Beverages allowed on Premises? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Unlocked by 7:15 AM To Allow For Presenter To Set Up? <input type="checkbox"/> Yes <input type="checkbox"/> No	

PART D	ADDITIONAL FACILITY ITEMS
<input type="checkbox"/> Table and Chairs for registration process	
<input type="checkbox"/> Table and Chairs for participants	
<input type="checkbox"/> Table, podium, & small projector table/ cart at front of room for speakers	
<input type="checkbox"/> Flip chart and writing instruments for speakers	
<input type="checkbox"/> Projector screen	
<input type="checkbox"/> Microphone (cordless and podium style) if applicable	
<input type="checkbox"/> Table for Refreshments	